



3rd Party HAN Device Provisioning

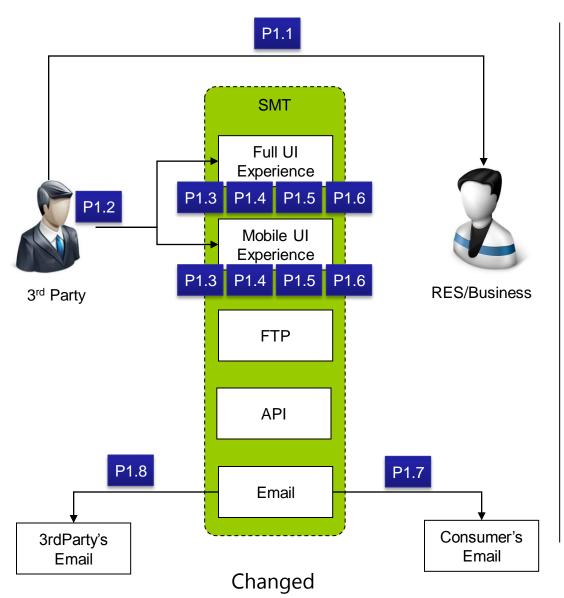
Processes and Storyboards

May 29, 2012





Process



Primary Storyboard

- **P1.1** 3rd Party meets with RES/Business customer and collects information (3rd Party)
- P1.2 3rd Party logs into SMT and navigates to My Account/Customer Agree, emts, then clicks on the 'Provision HAN Device' button (3rd Party, Mobile, 3rd Party LOA)
- **P1.3** On the 'HAN Provision' page, 3rd Party enters the RES/Business info collected into SMT UI, clicks affirmation and clicks 'Submit' to initiate the provision request (3rd Party, Mobile, 3rd Party LOA)
- **P1.4** If validation is successful, SMT gives success on the UI (3rd Party, Mobile)
- P1.5 SMT creates and stores HAN device provision request on SMT and sets status to "Add Acknowledged' (3rd Party, Mobile)
- P1.6 SMT creates a non-registered mechanism for RES/Business user to accept the HAN Provision Request (3rd Party)
- **P1.7** SMT sends a HAN Provision Request email to RES/Business user with a copy of the request information entered by 3rd Party (3rd Party)
- **P1.8** SMT sends a device provision request initiated confirmation email to 3rd Party (3rd Party)

Note: 3rd Party must collect from the customer:

Registered? Yes/No
 If Yes, just User ID

If No.

- Service Address
- City
- State
- •Zip Code
- •ESIID(s)
- Meter #(s)
- Company (if applicable)
- First Name
- Last Name
- •Title (if applicable)
- •Telephone Number
- Email Address
- Type of HAN Device
- •HAN Device MAC Address
- Installation Code
- Business or Residence needed if customer chooses to register (optional)

Notes:

- There will be an API to support a HAN Device Provision and De-Provision (current API to be modified to support new customer 'Starts Pairing Window' process)
- May need a process when customer does not have an email address.





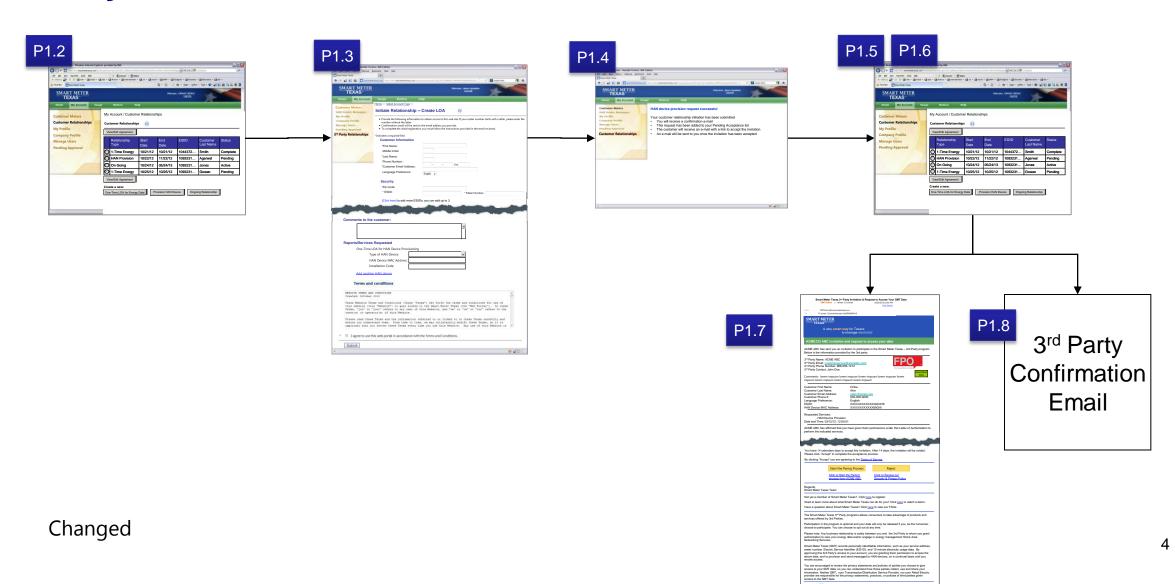
3rd Party Initiates a HAN Device Provision Traceability Matrix

Functional Tracker	Business Requirement #	Business Requirement Description	3rd Party and Mobile #	Process Description
3rd Party	BR - 019.015	 Ability for 3rd parties, customers, and TDSPs to set up LOAs. Note – This is in place for 3rd parties in 3rd Party Phase 1, Customers have the friends and family functionality, and this will not be implemented for TDSPs 	P1.1	 3rd Party meets with RES/Business customer and collects information
3rd Party	BR - 019.015	 Ability for 3rd parties, customers, and TDSPs to set up LOAs. Note – This is in place for 3rd parties in 3rd Party Phase 1, Customers have the friends and family functionality, and this will not be implemented for TDSPs 	P1.2	 3rd Party logs into SMT and navigates to My Account/3rd Party Relationships, then clicks on 'Create LOA'
3rd Party LOA	BR - 019.012	 Ability for a 3rd party to attest on the common web portal that they have a Customer authorization (hardcopy or electronic) authorizing them to read only access the Customer's data 	P1.3	 On the 'Create LOA' page, 3rd Party enters the RES/Business info collected into SMT UI, affirm authorization and clicks 'Submit' to initiate the invitation
CR 018 Mobile App	N/A	 Optimize existing SMT User Interface to support a smart phone / smart device browser Extend existing SMT functionality to support multiple mobile phone / device browsers Develop standalone SMT applets for use by a smart phone / smart device 	P1.2 to P1.5	 3rd Party logs into SMT and navigates to My Account/3rd Party Relationships, then clicks on 'Create LOA' On the 'Create LOA' page, 3rd Party enters the RES/Business info collected into SMT UI, affirm authorization and clicks 'Submit' to initiate the invitation If validation is successful, SMT gives success
No change				 SMT creates and stores LOA request on SMT and sets status to "Pending" – sub storyboards apply





3rd Party Initiates a HAN Device Provision Storyboard



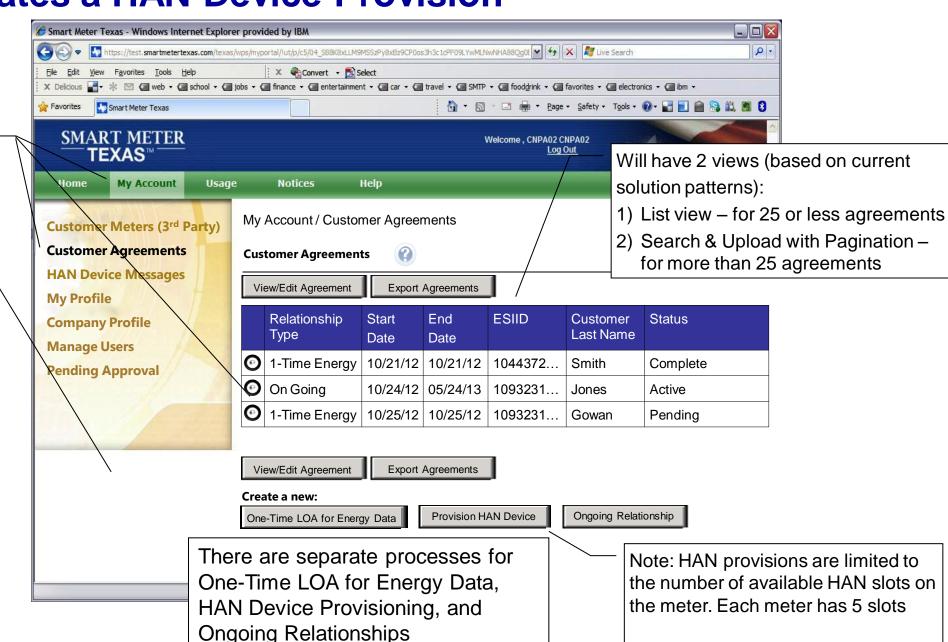




P1.2

P1.2 3rd Party logs into SMT and navigates to My Account/Customer Relationships, then clicks on the 'Provision HAN Device' button

Note: if the user starts the process from a supported smart phone, the link will open the SMT Mobile App if it is installed. If not installed, it opens the browser, which triggers a message asking the user to install the SMT Mobile App for the best experience. The user can choose to continue on the browser. This process applies in all situations for the UI





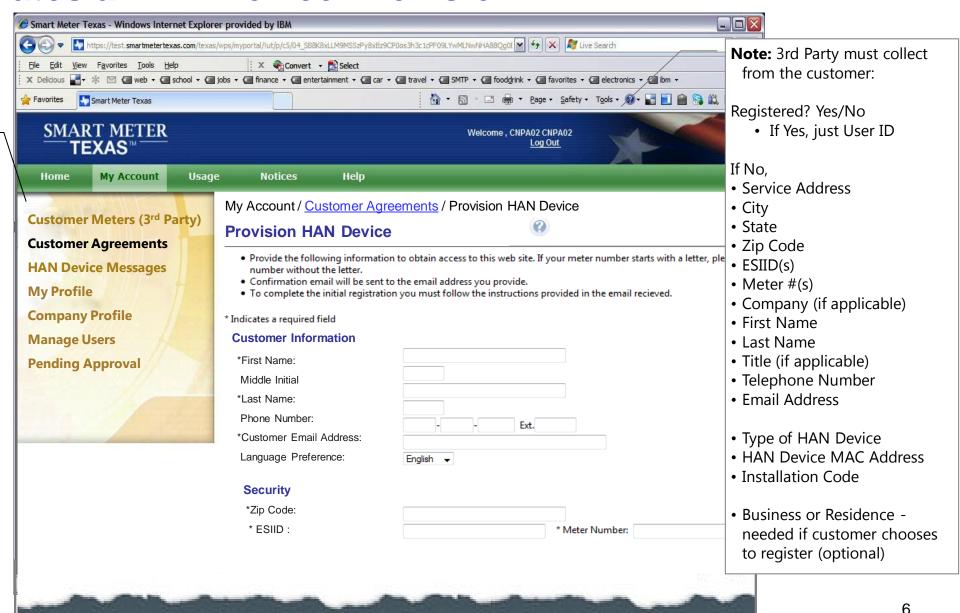


P1.3

P1.3 On the 'Provision HAN Device' page, 3rd Party enters the RES/Business info collected into SMT UI and... continued on the next page

The user will be able to:

- 1) Autofill 3rd Party Company Profile info
- 2) Autofill 3rd Party My Profile info
- Manually type in 3rd
 Party Contact into the request form







Continued from previous page

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3rd Parties may want content explaining to customer to hit Start <u>after</u> they have the received the device

Continues from previous page

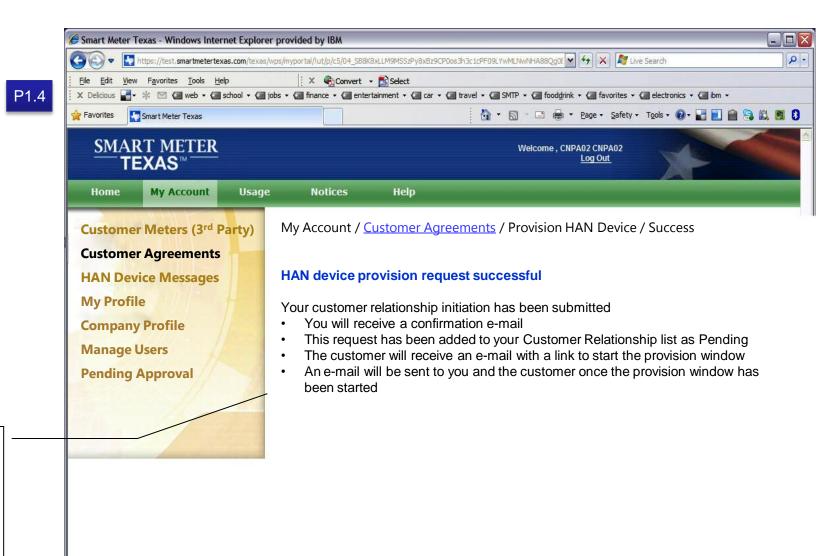
P1.3 ...clicks 'Submit' to initiate the invitation

Note: Verification process – validation of information provided – will be triggered by 'Submit" button prior to granting access

P1.3 Comments to the customer: Reports/Services Requested One-Time LOA for HAN Device Provisioning Type of HAN Device: SMT will verify that there are HAN Device MAC Address: enough slots on the meter to Installation Code: support the request. Add another HAN device If no, SMT will deliver an error Terms and conditions message on the UI. WEBSITE TERMS AND CONDITIONS Created: October 2010 These Website Terms and Conditions (these "Terms") set forth the terms and conditions for use of this website (this "Website") to gain access to the Smart Meter Texas (the "Web Portal"). In these Terms, "you" or "your" refers to any user of this Website, and "we" or "us" or "our" refers to the owner(s) or operator(s) of this Website Please read these Terms and the information referred to or linked to in these Terms carefully and ensure you understand them. From time to time, we may unilaterally modify these Terms, so it is important that you review these Terms every time you use this Website. Any use of this Website is I agree to use this web portal in accordance with the Terms and Conditions. Submit







No change

UI

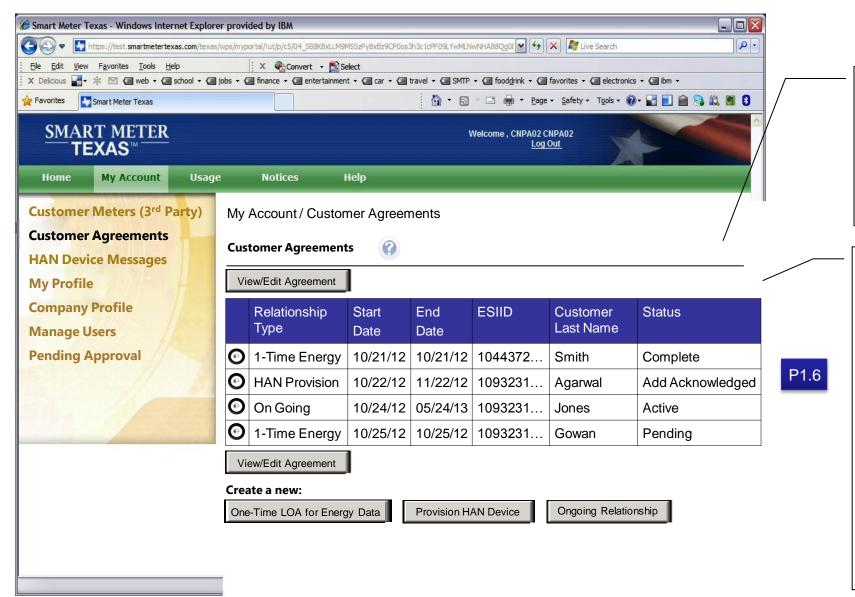
P1.4 If validation is successful, SMT

gives success on the









P1.5 SMT creates and stores LOA request on SMT and sets status to "Pending"—sub storyboards apply

At this point,
mechanism (e.g.
hidden public URL)
that allows a
customer to accept
the invitation, when a
customer navigates
to it by clicking
accept in the OneTime LOA invite, it
would trigger the LOA
to move from
"Pending" to
"Accepted"





Note: Some of the data will be masked

P1.7 SMT sends a
HAN Provision
Request email to
RES/Business user
with a copy of the
request information
entered by 3rd Party

Note: Customer has 14 calendars days to accept or LOA status is set to 'Not Accepted'

Note: The content in the example is only for placeholder purposes. This is NOT a draft of the content.

Enhanced Subject line to include the full Smart Meter Texas 3rd Party Invitation & Request to Access Your SMT Data SMTAdmin to: James J Cochran solution name (e.g. Smart Meter Texas) Hide Details From: SMTAdmin@smartmetertexas.com □ James J Cochran/Kansas City/IBM@IBMUS **SMART METER** Add SMT specific branding for recognition TEXASTM and credibility A very **smart way** for Texans to manage electricity! ACME123 ABC invitation and request to access your data Add an introduction line to inform the user of the purpose of the email. ACME ABC has sent you an invitation to participate in the Smart Meter Texas - 3rd Party program. Below is the information provided by the 3rd party: 3rd Party Name: ACME ABC 3rd Party Email: customerservice@acmeabc.com 3rd Party Phone Number: 888-555-1212 3rd Party logo and contact information 3rd Party Contact: John Doe GreenSea FPO Comments: lorem impsum Customer First Name: Chika **Customer Contact Information** Customer Last Name: Akin Customer Email Address: cakin@gmail.com 000-000-0000 Customer Phone #: Language Preference: English ESIID: XXXXXXXXXXXX3404378 HAN Device MAC Address: XXXXXXXXXXXX89GHI LOA Type (Energy Data or HAN Provision) Requested Services: - HAN Device Provision Date and Time: 03/12/12, 12:05:01 3rd Party Affirmation ACME ABC has affirmed that you have given them permissions under this Letter of Authorization 260 perform the indicated services.





P1.7

Might want a note that states, Registration is not necessary.

The HAN Device Provisioning could be more than 14 days for customer to 'Start', looking to hear from the HAN group on this

Changed

You have 14 calendars days to accept this invitation. After 14 days, the invitation will be voided. Please click "Accept" to complete the acceptance process.

By clicking "Accept" you are agreeing to the Terms of Service

Start the Paring Process

Reject

Click to Review our Security & Privacy Policy

Click to Start the Pairing process from ACME ABC

Regards,

Smart Meter Texas Team

Not yet a member of Smart Meter Texas? Click here to register.

Want to learn more about what Smart Meter Texas can do for you? Click here to watch a demo.

Have a question about Smart Meter Texas? Click here to view our FAQs.

The Smart Meter Texas 3rd Party programs allows consumers to take advantage of products and services offered by 3rd Parties.

Participation in the program is optional and your data will only be released if you, as the consumer, choose to participate. You can choose to opt out at any time.

Please note: Any business relationship is solely between you and the 3rd Party to whom you grant authorization to view your energy data and/or engage in energy management Home Area Networking Services.

Smart Meter Texas (SMT) records personally identifiable information, such as your service address, meter number, Electric Service Identifier (ESI ID), and 15-minute electricity usage data. By approving this 3rd Party's access to your account, you are granting them permission to access the above data, and to provision and send messaged to HAN devices, on a continual basis until you revoke access.

You are encouraged to review the privacy statements and policies of parties you choose to give access to your SMT data; so you can understand how those parties collect, use and share your information. Neither SMT, your Transmission/Distribution Service Provider, nor your Retail Electric provider are responsible for the privacy statements, practices, or policies of third parties given access to the SMT data.

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Provide a section for references back to SMT to drive awareness and adoption.

Provide a section, specific to the type of email, for communicating disclaimers, terms and conditions, as needed.

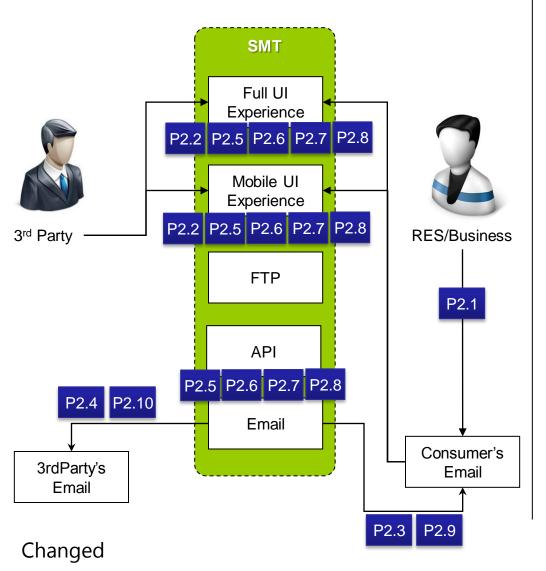
Provide a section for links back to Smart Meter Texas news flashes and announcements on Twitter

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Process



Primary Storyboard

- **P2.1** RES/Business user opens email and clicks on "Start the Paring Process" to open the pairing window on the meter (3rd Party)
- **P2.2** SMT presents Pairing Process Started confirmation page (3rd Party, Mobile)
- **P2.3** SMT sends a confirmation email to the RES/Business user (with HAN Device Pairing information) indicating that 3rd party has been granted access to provision the device (e.g RES/Business Meter Ready Email) (3rd Party)
- **P2.4** SMT sends a notification email to the 3rd party that the pairing process has been accepted and started (3rd Party Meter Ready Email) (3rd Party)
- **P2.5** SMT sends the provision request to the TDSP (3rd Party, Mobile)
- P2.6 TDSP acknowledges the request and initiates the HAN Provisioning Process (3rd Party)
- **P2.7** If successful, TDSP opens the pairing window and sends SMT a 'Meter Ready' [for pairing] status (3rd Party, Mobile)
- **P2.8** If the customer successfully pairs the HAN device the TDSP sends SMT a 'Device Added' status (3rd Party, Mobile)
- **P2.9** SMT sends a HAN device pairing successful confirmation email to the RES/Business (3rd Party)
- **P2.10** SMT sends a HAN device pairing successful confirmation email to the 3rd Party (3rd Party)

Notes:

- Provisioned HAN devices are managed in My Account/Customer Meters for 3rd Parties
- HAN devices are managed in My Account/HAN Devices for customers
- 3rd Parties cannot send messages to HAN devices until an ongoing relationship is established
- Need to include the customer name, in the 3rd Party notification email





Customer Accepts 3rd Party HAN Device Provision Request Traceability Matrix

Functional Tracker	Business Requirement #	Business Requirement Description	3rd Party and Mobile #	Process Description
3 rd Party	BR - 019	Ability for a Customer to electronically authorize release of usage data to a 3rd party (i.e. someone other than the Rep of Record - either a REP, aggregator, or registered 3rd party).	P2.1	 RES/Business user opens email and clicks on "Accept" to start the acceptance process for the relationship
3rd Party LOA	BR - 019.012	 Ability for a 3rd party to attest on the common web portal that they have a Customer authorization (hardcopy or electronic) authorizing them to read only access the Customer's data 	P2.1	 RES/Business user opens email and clicks on "Accept" to start the acceptance process for the relationship
3rd Party	BR - 019.014	 Ability for 3rd parties and / or Customers to receive a notification when access has been granted, access has been changed, or access has been revoked for an ESIID 	P2.3, P2.4	 SMT sends a confirmation email to the RES/Business user (with copy of LOA) indicating that 3rd party has been granted access to one-time report SMT sends a notification email to the 3rd party that the LOA has been accepted



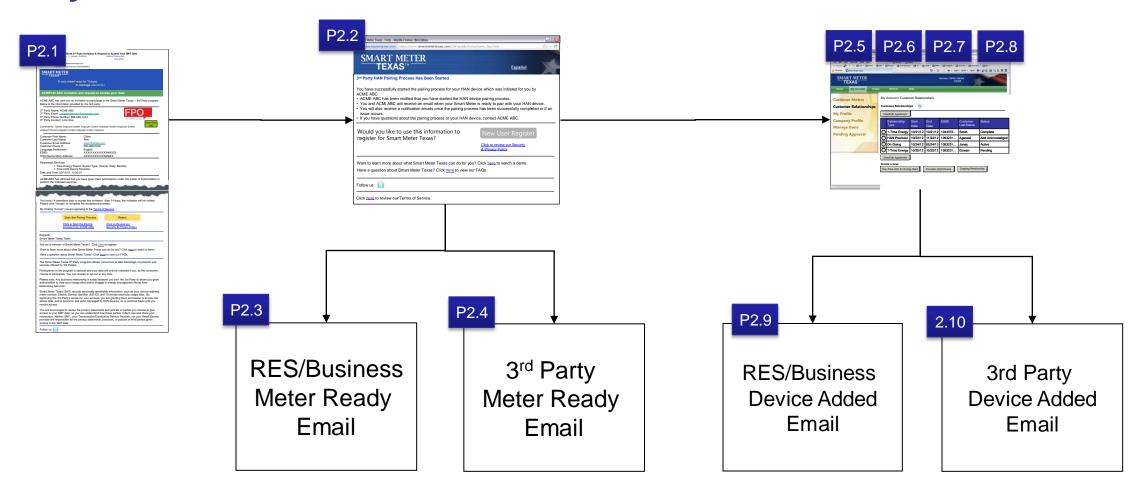


Customer Accepts 3rd Party HAN Device Provision Request Traceability Matrix

Functional Tracker	Business Requirement #	Business Requirement Description	3rd Party and Mobile #	Process Description
CR 018 Mobile App	N/A	 Optimize existing SMT User Interface to support a smart phone / smart device browser 	P2.2	■ SMT presents LOA confirmation page
		 Extend existing SMT functionality to support multiple mobile phone / device browsers 		
		 Develop standalone SMT applets for use by a smart phone / smart device 		



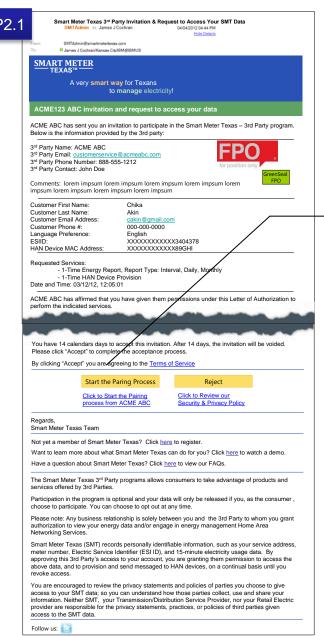








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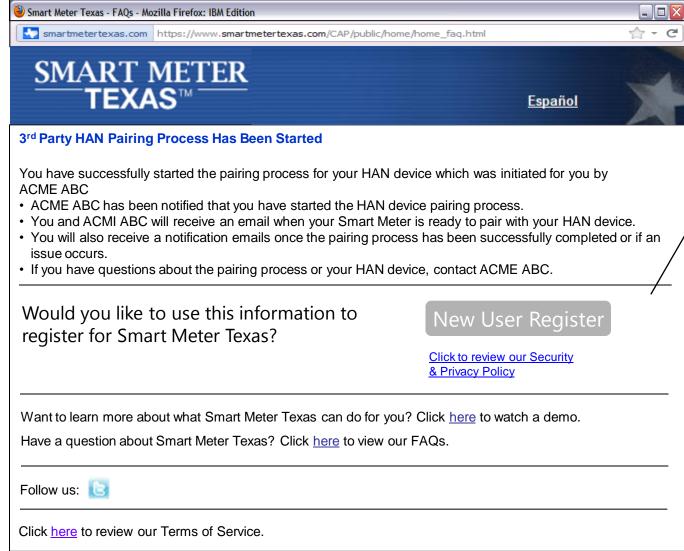


P3.1 RES/Business user opens email and clicks on "Start the Pairing Process" to start the acceptance process for the relationship









P2.2 SMT presents Start Pairing Process confirmation page





